

Attachment 22 – 21 Day ePortal Project Guidance

The “Agency 21 Day Project” is found under the “Agency 21 Reports” Community in the “Community Projects” Box on the ePortal. The Agency 21 Day Project should be updated each quarter by each Entity.

Please direct any questions you have to the primary POC for the ePortal, Mr. Christian Mazzarella, at COM 317-510-2569, DSN 699-2569.

Agency 21 Day Project

The Agency 21 Day Project contains 5 tabs of information: Overview, Calendar, Tasks, Documents, and Discussions. Each quarter, entities are required to update the Tasks and Document tabs. The Overview, Calendar, and Discussions tabs provide useful information to the user. Please see below for Tab descriptions and guidelines on how to update the required tabs.

1. Overview Tab:

The Overview Tab is the initial point of entry into the Agency 21 Day Project- XX Qtr FY XX. The tab contains a section for Announcements, Updated Documents, and Recent Messages.

2. Calendar Tab:

The Calendar Tab presents a monthly view of the Tasks contained in the task lists under the task tab. A user may click on a task on the calendar to view its properties. A user may also add events to the calendar using the “New Event” button in the upper left hand corner.

3. Discussions Tab:

The Discussions Tab contains an “Agency 21 Day Discussion” for each center. Users may use these discussion boards to communicate with other team members.

4. Tasks Tab:

Each Entity has an Agency 21 Day Project Task List under the Task Tab. The Task List should be updated each quarter to reflect the tasks to be completed each quarter.

5. Documents Tab:

The Documents tab contains folders for each Entity, along with Quarter specific folders. The Documents Tab is where all files should be uploaded. Each document folder contains specific documents as described below:

- **CIP-Files For Distributions-** The CIP folder contains subfolders for each month. The NAVFAC and USACE upload to the subfolders according to the criteria below:
 - Each Monthly subfolder:
 - Upload the applicable Month’s CIP excel spreadsheet for Departments 21, 57, and 97.
 - Upload the Quarterly CIP excel spreadsheet if applicable for Departments 21, 57, and 97.
 - Components will download their respective data and can use this folder to share files that are too large to send via email.
- **Entity Folders-**The Individual Entity’s Folders contain 3 subfolders under the Documents tab: Confirmations & Certifications, Reconciliations, and Standard Guidance Checklist. Each entity should upload documents and files to the subfolders according to the criteria below:
 - Confirmations & Certifications subfolder:
 - Upload Attachment 3 - Client Executive Certification Letters
 - Upload Attachment 4 - Client Confirmation Letters
 - Reconciliations subfolder:
 - Reconciliation explanations **must** be uploaded in DDRS; the ePortal is not a substitute for doing this.
 - Reconciliation explanations **can** be uploaded to the ePortal if the entity has more detail than allowed in DDRS.
 - Standard Guidance Checklist subfolder:
 - Upload Attachment 11B – Standard Guidance Checklists

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- **Waived Entity Files** – The Waived Entity folder contains buyer-side and elimination information. Applicable entities should upload their buyer-side or elimination spreadsheets into this folder.
- **Agencywide Docs and Guidance Folder** - The Agencywide Docs and Guidance Folder contains the following subfolders for each quarter, 200X XX Qtr AW Guidance and 200X XX Qtr OSD Letter. The folders contain the following data:
 - 200X XX Qtr AW Guidance:
 - Contains the Quarterly Guidance Attachments as sent out to the field each quarter.
 - 200X XX Qtr OSD Letter:
 - Contains the Agency-wide Certification Letter for the Quarter.
- **Agency-Wide After Action Review** – The folder contains PowerPoint slides from the After Action Review meetings when applicable. The PowerPoint Slides are posted by an Agency-Wide team member.
- **Training Folder** – The training folder contains helpful information on how to use to the eportal. The following files are located under the folder:
 - A21 Project User Guide.doc
 - Agency 21 Day Step by Step Guide.ppt
 - Business Flow II.ppt

6. General Information:

The following tips and tricks are provided to assist you with common issues we have experienced with the day-to day functionality of the ePortal. They are provided to make your job easier and more efficient. If you have a tip or trick that someone else might benefit from, you are encouraged to contact the Agency-Wide POC for the 21 Day Project and share the information for a later edition of this document.

How to Clear the Internet Cache

Win 2000 and Win XP:

Open Internet Explorer

Click "Tools"

Click "Internet Options"

- In the center of the window, you will see a section called "Temporary Internet Files" with Buttons to "Delete Cookies", "Delete Files", and "Settings"

Click "Delete Cookies", then click "OK"

Click "Delete Files" (you can put a check in the optional box to delete all offline content if you wish), then click "OK"

Click "OK" at the bottom of the window

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How to Order the ePortal Task List Correctly

Try clicking the word "Start Date" in the heading line. That will order the tasks by start date. If that doesn't get things exactly right, try renaming the major tasks (not the sub-tasks) by putting a sequence number at the beginning of the task name:

- Open Internet Explorer
- Open the Agency 21 Day Project
- Click the "Tasks" tab
- Click on your task list * (for this example, I'll use Indianapolis Agency-Wide)

The screenshot displays the 'Agency 21 Day Project - 4th Quarter FY 2005' interface. The 'Tasks' tab is active, showing a list of tasks for the 'Agency 21 Day Project - Indianapolis Agency-wide' project. The task list is sorted by 'Start Date'.

Task	Assigned To	Status	Start Date	End Date
02. Day 1	DFAS\MATTHEW.GOR	100%	10/1/05	10/1/05
Provide VSBPExpenseAcco	DFAS\MATTHEW.GOR	100%	10/1/05	10/1/05
DFAS-IN ADT Teleconferen	DFAS\GERALD.DAVERPORT	100%	10/1/05	10/1/05
02. Day 2	DFAS\GERALD.DAVERPORT	100%	10/2/05	10/2/05
DFAS-IN ADT Teleconferen	DFAS\GERALD.DAVERPORT	100%	10/2/05	10/2/05
USACE-FC will provide sub-	DFAS\CHRISTIAN.NATZARELLA	100%	10/2/05	10/2/05
04. Day 4	DFAS\GERALD.DAVERPORT	100%	10/4/05	10/4/05
DFAS-IN ADT Teleconferen	DFAS\GERALD.DAVERPORT	100%	10/4/05	10/4/05
05. Day 5	DFAS\TERRY.FOBERTS	100%	10/5/05	10/5/05
Input Employee Benefit de	DFAS\TERRY.FOBERTS	100%	10/5/05	10/5/05
DFAS-IN ADT Teleconferen	DFAS\GERALD.DAVERPORT	100%	10/5/05	10/5/05
06. Day 6	DFAS\GERALD.DAVERPORT	0%	10/6/05	10/6/05
DFAS-IN ADT Teleconferen	DFAS\GERALD.DAVERPORT	100%	10/6/05	10/6/05
Components Waived from	DFAS\GERALD.DAVERPORT	0%	10/6/05	10/6/05
OSD Sites with Waived Enti	DFAS\GERALD.DAVERPORT	0%	10/6/05	10/6/05

Project Summary for 'Agency 21 Day Project - Indianapolis Agency-wide':

- Tasks: 177
- Status: 0%
- Start Date: Thursday, September 1, 2005
- End Date: Friday, December 30, 2005

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- Scroll through your task list until you find the task you want to appear as the first in the list* (for this example, it is the task named "Pre 21-Day Activities")

Task	Assigned To	Status	Start Date	End Date
47. Day 76	DFAS/GERALD.DAVERNPORT	0%	12/15/05	12/15/05
Submit certification and verification of Tr	DFAS/GERALD.DAVERNPORT	0%	12/15/05	12/15/05
FY 06 Engagement Letter FY 06 Mgmt Act	DFAS/GERALD.DAVERNPORT	0%	12/15/05	12/15/05
48. Day 91	DFAS/GERALD.DAVERNPORT	0%	12/30/05	12/30/05
Submit Debt Collection Improvement Act	DFAS/GERALD.DAVERNPORT	0%	12/30/05	12/30/05
01. Pre 21-Day Activity	DFAS/TERRY.ROBERTS	100%	9/1/05	9/29/05
Entity Code Validation to Network	DFAS/TERRY.ROBERTS	100%	9/1/05	9/10/05
Mapping Changes to FMO	DFAS/TERRY.ROBERTS	100%	9/1/05	9/15/05
DDRS Testing	DFAS/TERRY.ROBERTS	100%	9/1/05	9/24/05
Employee Benefits Data Collection	DFAS/TERRY.ROBERTS	100%	9/1/05	9/14/05
Request VSEP Information from Central S	DFAS/MATTHEW.COM	100%	9/15/05	9/18/05
Receive TCA by Central Site	DFAS/TERRY.ROBERTS	100%	9/15/05	9/15/05
Imputed Costs to Actuary	DFAS/MATTHEW.COM	100%	9/21/05	9/21/05
Quarterly Guidance Distributed	DFAS/GERALD.DAVERNPORT	100%	9/23/05	9/23/05
Receive Imputed Costs Data	DFAS/MATTHEW.COM	100%	9/29/05	9/29/05

- Select the task, right click on it, and choose "Edit". Put the sequence number "01" in front of the task name* (I also include a period and 2 spaces after the sequence number).

Edit Task

Property

Without the properties below to edit this task.

Properties

Name: 01. Pre 21-Day Activity

Description:

Start Date: 9/1/2005 Due Date: 9/29/2005

This task has subtasks and cannot have dependents.

This task is a milestone Display in Calendar

Assigned to: DFAS/TERRY.ROBERTS

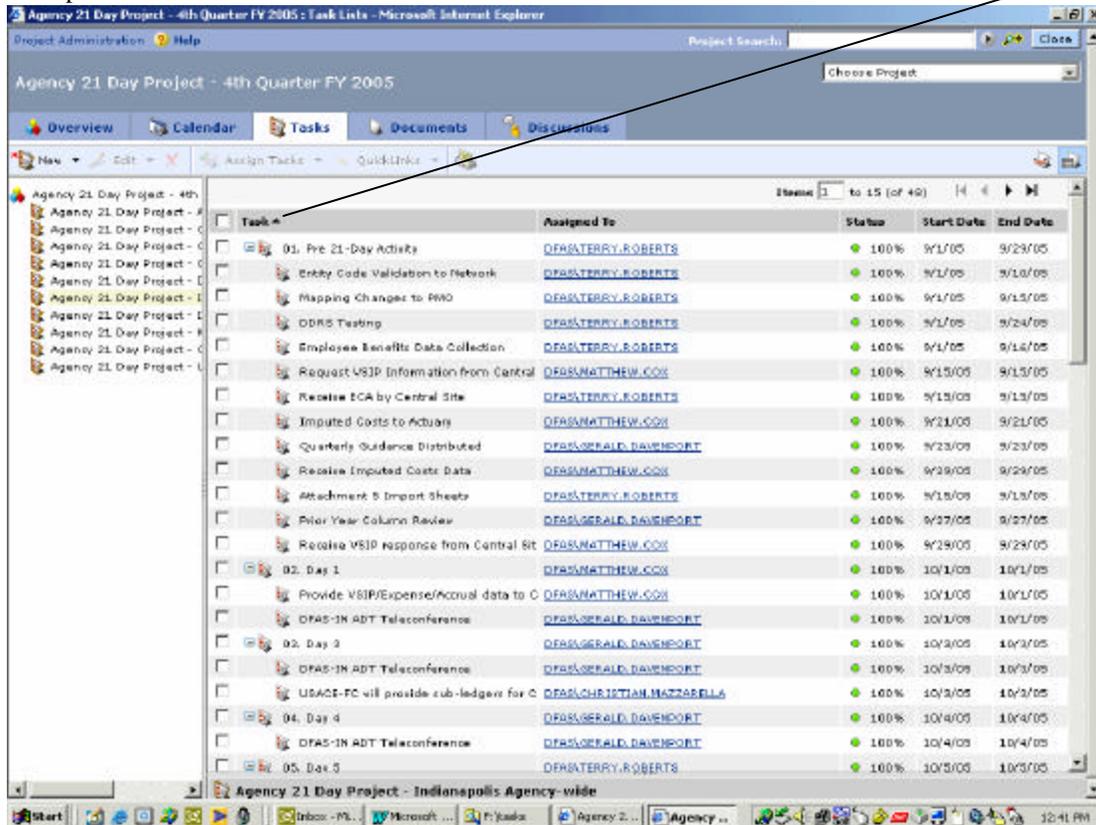
Status: 100%

Notification: On Assignment Start Date Due Date

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Continue numbering each task in your task list according to the sequence you want them in (**REMEMBER** – you do *not* need to number the sub-tasks).

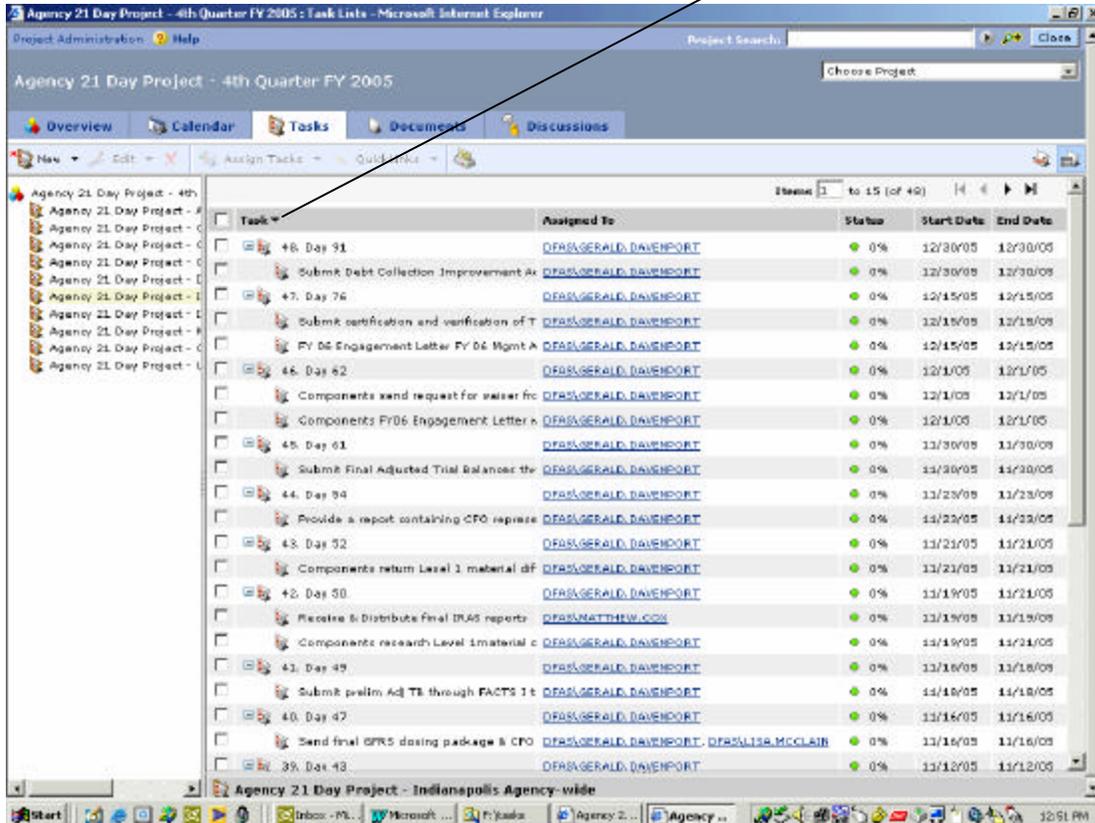
- Once all the tasks are numbered, go back to the beginning of the task list and click the word "Task" * at the top of the task name column.



Clicking "Task" will reorder the task list by the task name, which now has the correct sequence number as the initial characters! Notice the sub-tasks follow the task they are assigned under, so there is no need to number them.

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- You can click "Task" again to resort the task list in reverse order*.



How to Get Help

For assistance with any ePortal or 21 Day Project issues, you can contact the Agency-Wide Financial Statements office at DFAS-Indianapolis. Email and telephone are both acceptable means of communication. The POCs are:

Terry Roberts (terry.roberts@dfas.mil), COM 317-510-7252, DSN 699-7252

Chris Mazzarella (christian.mazzarella@dfas.mil), COM 317-510-2569, DSN 699-2569

Gerald Davenport (gerald.davenport@dfas.mil), COM 317-510-4165, DSN 699-4165

...or you can contact anyone in the Agency-Wide Financial Statement office.

Email can also be sent directly to the ePortal team using the email address "ePortal" in Outlook (eportal@dfas.mil). Please copy the Agency-Wide POCs on the message so we can track your issue and disseminate any new information or advice to the network.